



INITIATIVE 9:

FOSTER CROSS-BORDER COLLABORATION

PRACTICES IN OTHER AREAS AND POTENTIAL MA IMPROVEMENTS

Transit systems are complex entities that require expertise in a large number of areas. At the same time, most small to medium size transit systems have only small management and administrative staff. As a result, it is not realistic to expect that all RTA Administrators, or their limited management and administrative staff, be experts in all areas.

At present, there is a already large amount of collaboration between RTAs and with the MBTA. The most recent example is the assistance that BAT provided to SRTA to manage that RTA and address management and operating issues until an new Administrator was brought onboard. Then, following the hiring of a new Administrator, BAT and other RTAs have continued to provide assistance to bring new SRTA staff up to speed. RTAs have also collaborated among themselves and with the MBTA on CharlieCard implementation, and some RTAs collaborate with the MBTA on the management and operation of MBTA stations.

The collaboration that does occur is on an informal, or ad-hoc basis. As a result, not all RTAs are aware of what other RTAs are doing, or are able to do. Also, the RTAs usually work individually with the MBTA on issues such as station management and operation. Some RTAs have reported having a very good working relationship with the MBTA, while others have reported significant challenges. There are also shared issues that the RTAs do not collaborate on. One current example is the development of Title VI policies, which nearly all RTAs have reported to be a significant challenge to complete. More formal “cross-border” collaboration could fill many gaps in existing efforts in a manner that would increase the benefits of collaboration beyond those that already being achieved. Examples include:

Operation of Regional Services – All of the RTAs serve unique geographical areas. However, many of the trips that transit riders make—or desire to make—cross RTA boundaries. Collaboration in service delivery could provide more seamless service.

Management/Operation of Regional Facilities – Throughout the Commonwealth, there are a number of regional facilities, many of which are MBTA commuter rail stations. Many of these facilities are owned and operated by the MBTA, some are owned and operated by an RTA, and others are owned by the MBTA but managed and operated by an RTA. Outside of the Boston area, these are some of the state’s most important transit facilities, and those that are managed and operated with local involvement are among the best in the state (for example, Brockton, Lowell, North Billerica, and Worcester’s Union Station). A higher level of RTA involvement in the management and operation of regional facilities could provide for upgrades at additional stations, and this could be facilitated through the development of consistent policies.

Grants Management – There are a variety of federal and state grants available to support transit service and operations. However, it can be difficult for small transit agencies to designate staff time to research potential grants and complete applications. When grants are successful, RTAs must then get programs started and manage grant reporting and oversight. Sharing resources to compete for grants and manage programs can facilitate this process and ease burdens on individual RTAs.

Training – All RTAs must perform a number of training activities, especially driver training. Some RTAs are members of the Massachusetts Rural Transit Assistance Program (MARTap), which is a federally funded, state-administered program that offers training, education and technical assistance programs with special emphasis on rural services. This program could provide service to all RTAs



(although the focus is on rural providers, the program is not restricted to rural providers) and/or larger RTAs could provide training for smaller RTAs.

Maintenance – Depending on the fleet size and composition and expertise of staff, vehicle maintenance may provide an opportunity for collaboration, especially with respect to heavy maintenance.

Procurement – All RTAs procure many similar types of equipment, facilities, and services. Efficiencies may be gained through collaboration for agency purchases. This may involve joint purchases to increase purchasing power for items such as employee benefits or insurance.

Intelligent Transit Systems (ITS) – ITS options continue to advance rapidly, and small transit agencies are often challenged to implement new technologies. This may be due to a lack of familiarity with current trends and costs, difficulty with procurement, and/or a lack of expertise to fully implement and manage new systems. Developing and sharing expertise in ITS could help agencies successfully procure and implement new technologies.

Human Resources – Finding, retaining, and training good staff is a challenge for transit agencies large and small. Where there are opportunities to jointly recruit staff and perform other human resources functions, agencies may achieve increased efficiencies.

Community Outreach – Reaching out to local communities and understanding their transportation needs is an essential part of developing successful transit services. In many cases, small transit agencies are able to only designate a fairly small portion of staff time to working with members of the community and community organizations.

Regulations – The number of regulations that transit systems must comply with is constantly changing and often increasing. An increased emphasis on Title VI compliance at the federal level is one example, and this project may also recommend new state regulations. A collaborative approach to addressing regulations could ease the burden on individual RTAs.

In total, the management of transit systems is complicated. Massachusetts' 15 RTAs have a variety of individual strengths and weaknesses. Greater collaboration among RTAs provides the opportunity to leverage the strengths of each to better address shared interests.

EXAMPLES FROM OTHER STATES

California

The Southern California Regional Transit Training Consortium (SCRTTC) is a coalition of more than 30 transit operators, community colleges, and other educational organizations that work together to develop standardized training for the transit industry. The Consortium is an effort to reduce training costs and share the best curricula (hence the partnership between transit agencies and educational expertise). The Consortium works to:

- Improve, refine, and make more efficient regional transit training
- Coordinate and share information and resources within the Southern California area for the purpose of improving existing transit training
- Develop new methods and systems for training to keep pace with technological changes taking place in the industry
- Create regional shop standards



Delaware and Pennsylvania

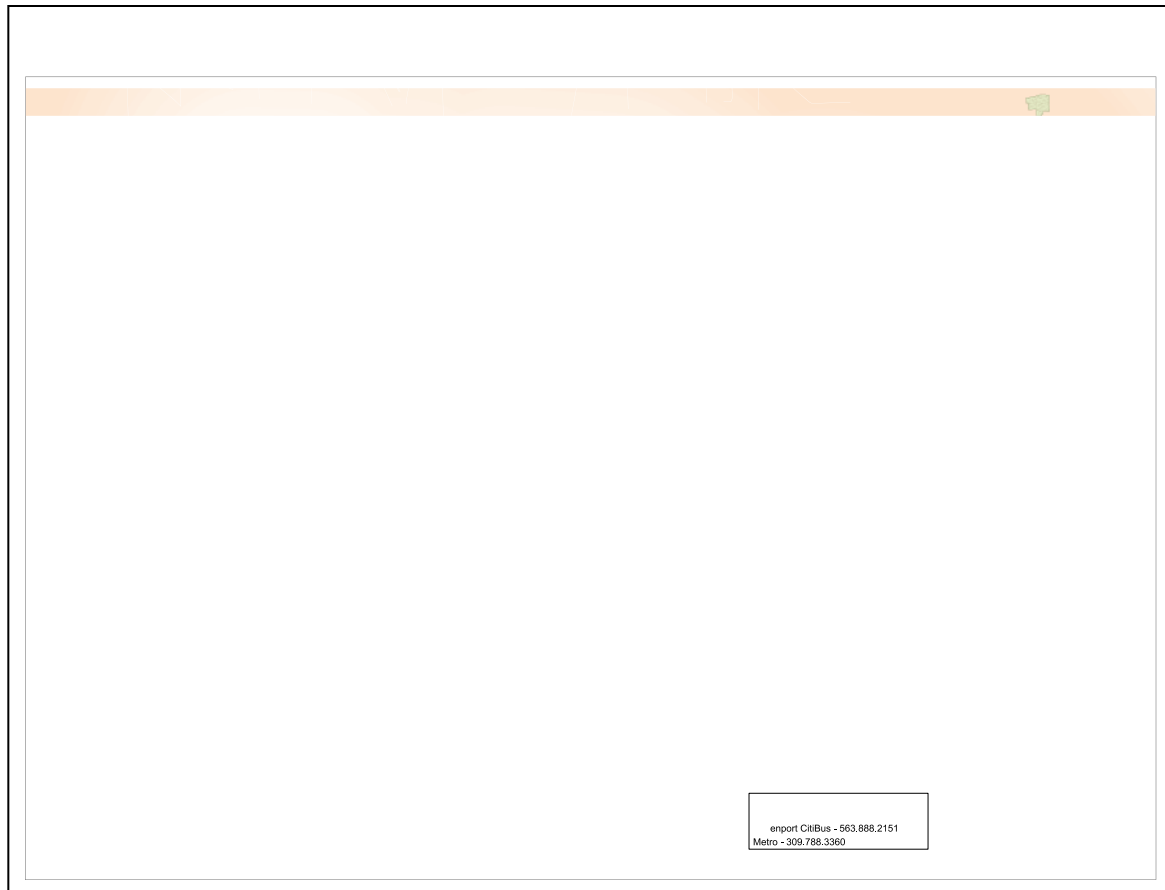
The Southeastern Pennsylvania Transportation Authority (SEPTA), which serves the Philadelphia area, also operates a regional rail line between Delaware and Philadelphia. The Delaware Transit Corporation (DTC) coordinates with Amtrak, which owns the Delaware facilities, and contracts with SEPTA to provide the service. DTC pays SEPTA on unit cost basis, and is credited for revenues generated by Delaware passengers. In addition, DTC maintains ticket sales locations for SEPTA rail riders, and allows SEPTA pass customers to ride DTC buses to and from regional rail stations. Overall, this arrangement is a low cost way to increase ridership on all systems while providing ease of use for customers.

Iowa/Illinois

Four cities on the Iowa/Illinois border, Davenport and Bettendorf in Iowa, and Rock Island and Moline in Illinois, form the Quad City region. Three fixed-route and one demand-response transit systems serve the area and the four systems collaborate in a number of ways.

- The Rock Island and Davenport systems share a single maintenance facility that is managed by a separate board with membership from both agencies.
- A single marketing entity (Quad Cities Transit) produces all marketing including a Rider's Guide that presents information on all systems, including route-by-route information.
- The systems collaborate on a joint pass for fixed-route service.
- The systems produce a joint system map (see Figure 1).

Figure 1: Quad Cities Joint System Map





Ohio

The Ohio Department of Transportation's (ODOT) Office of Public Transportation strongly encourages coordination among transit agencies and other transportation providers, and has published a two volume publication on coordination:

Volume I – A Handbook for Coordinating Transportation Services provides an introduction to coordination, and outlines a step-by-step approach to starting a coordination program. Designed for transit agencies, and individual service providers, the handbook provides detailed worksheets, checklists, surveys, and other tools to take providers through the steps to understand what coordination is, begin pre-implementation planning, determine how to develop the cooperation program, and even set up joint use arrangements leading to implementation. The Handbook is designed to cover a range of potential services and functions. It includes a number of examples of Best Practices including:

- Joint training for drivers between a transit agency, hospital and social service provider in Seneca County
- Shared fueling arrangements between a transit agency and community action council in Mahoning County

Volume II – A Guide for Implementing Coordinated Transportation Systems is a supplement to Volume I and is intended to provide more specific direction during the implementation process. It includes references and examples of materials, documents and agreements from implemented, coordinated programs.

Vermont

As is the case in Massachusetts, Vermont is served by a number of medium to small transit systems that serve unique geographical areas, and where demand crosses those boundaries. Similar to bi-directional travel between Lowell and Lawrence, there is bi-directional demand for service between Middlebury and Rutland, Vermont. In that case, the two respective transit systems each provide half of the service and share costs. Addison County Transit Resources (ACTR), which is Middlebury's transit provider, operates trips that originate in Middlebury, and The Ride, which is Rutland's transit provider, operates trips that originate in Rutland. Service is coordinated so that each operator provides alternating trips.

In addition, ACTR and the Chittenden County Transit Authority (CCTA), which serves Burlington, collaborate on service between Middlebury and Burlington. CCTA operates weekday service, and ACTR operates Saturday service.

Figure 2: ACTR Regional Information

Connections

CCTA (Burlington)

ACTR partners with CCTA to provide the Middlebury/Burlington LINK service. ACTR runs this service on Saturdays. During the week the LINK is operated by CCTA. To contact CCTA go to their [website](#) or call 802-864-CCTA (2282).

Burlington LINK Express { ACTR transportation for everyone Since 1982

MVRTD (The Bus - Rutland)

ACTR and MVRTD collaborate to provide the Rutland Connector Route Monday through Friday. To contact MVRTD go to their website [www.thebus.com](#).

Rutland Connector { ACTR transportation for everyone Since 1982

MAHONY VALLEY REGIONAL TRANSIT DISTRICT



Washington

Statewide

In Washington State, public transit agencies pool their resources in order to provide and purchase insurance coverage, manage claims and litigation, and receive risk management and training. The Washington State Transit Insurance Pool (WSTIP) began in the late 1980s with eight transit agencies and now includes 25 agencies. WSTIP is governed by a board of directors, which includes a representative from each member transit agency.

Insurance coverage provided by WSTIP includes a combination of self-insurance, coverage purchased from a captive insurance pool, and commercial market insurance. There are several categories of coverage:

- Liability
- Property
- Miscellaneous, including employee theft, robbery, computer fraud, and more

WSTIP staff serves as a resource to transit agencies by providing services that benefit its members in terms of loss prevention, loss reduction, and/or resource sharing.

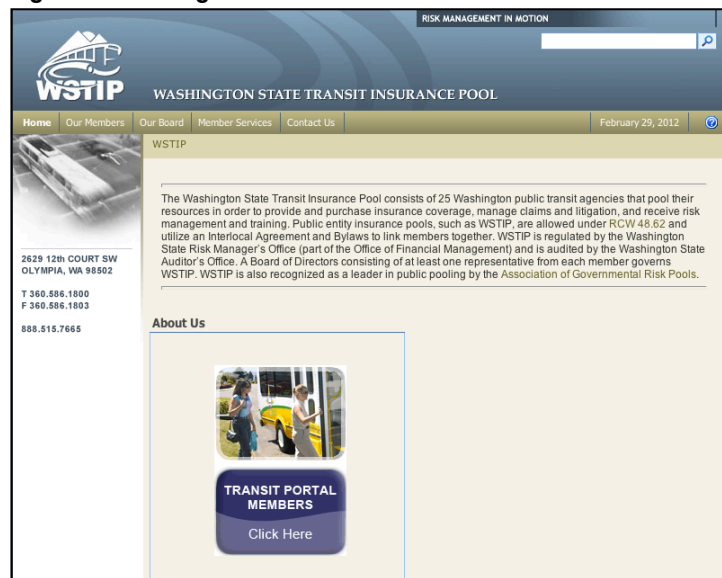
Seattle Area

In the Seattle area, seven different transit providers developed an integrated fare collection system. The ORCA (One Regional Card for All) system, which was implemented in 2009, is designed for transit riders who use multiple services and modes to travel through the Puget Sound area. Implementation of the ORCA system involved the creation of a formal agreement between agencies—the Interlocal Cooperation Agreement that defines involvement of all agencies in:

- Planning
- Cost sharing
- Establishment of a joint board for program oversight
- Ongoing management
- Fare processing and settlement

The partner agencies anticipate achieving significant benefits in customer convenience, service planning improvements, and operating efficiencies.

Figure 3: Washington State Transit Insurance Pool Portal



EXAMPLES WITHIN MASSACHUSETTS

Regional Service

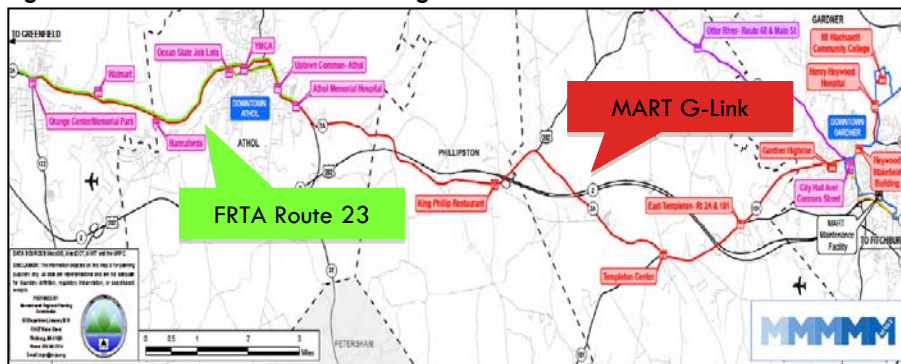
There are a number of examples of regional services that are provided in Massachusetts either through the efforts of a single RTA or through collaborations between RTAs. However, in contrast with the way



service and costs are shared between Middlebury and Rutland, Vermont, a single RTA funds the costs of each service. These include:

- MVRTA provides Route 41 service between MVRTA's McGovern Center in Lawrence and LRTA's Gallagher Transit Terminal in Lowell. This route provides service between two of the Merrimack Valley's larger cities, and provides connections to local routes at both ends. MVRTA funds the cost of the service, but the two agencies share fare revenue.
- Transfer points have been developed by a number of RTAs to facilitate transfers between systems. These arrangements are not as convenient for passengers as true regional services (like MVRTA's Route 41), and do not involve cost sharing or fare coordination. However, they do provide important regional travel opportunities: Examples include:
 - MART operates "G-Link" service between Gardner and Orange, which between Athol and Orange overlaps with FRTA's Route 23 Athol – Greenfield service (see Figure 4). The overlap between these two routes provides the ability for local residents to travel between Gardner and Greenfield and points in between.
 - PVRTA and FRTA services connect at the UMass Haisis Mall, in downtown Northampton, and in South Deerfield.
 - PVRTA also connects with Connecticut Transit (CTTransit) service in Enfield, CT. Through this connection, trips can be made to Hartford.

Figure 4: MART and FRTA Connecting Services



Many RTAs also provide service and connections to MBTA stations. Most of these connections are to commuter rail service; two examples are LRTA's Gallagher Terminal at Lowell Station, which is the hub of LRTA's services, BAT's BAT Center adjacent to Brockton Station. Some RTAs also provide feeder service to MBTA rapid transit stations:

- BAT service to and from Ashmont Station on the MBTA's Red Line
- MWRTA service to and from Woodland Station on the MBTA's Green Line

Finally, and while beyond the subject of this initiative, it should be noted that many RTAs have developed partnerships with private and other public operators, including private-carrier bus operators and the Steamship Authority. These arrangements include the use RTA terminals and stations for private bus operations, capital assistance for bus purchases, and ticket sales.



Management/Operation of MBTA Stations

A number of RTAs manage and operate MBTA stations. GATRA has operated the MBTA commuter rail station in Attleboro since the early 1980s, and has made most of the capital improvements since that time. In the Lowell area, LRTA owns and operates Lowell Station (and leases the land from the MBTA), and pays all station costs and receives all station revenue. In North Billerica, LRTA leases North Billerica Station from the MBTA, has improved and expanded the station, pays all station operating costs and splits parking revenue with the MBTA. In Brockton, BAT maintains Brockton Station for the MBTA.

Figure 5: North Billerica Station



CharlieCard

Since the MBTA introduced its new CharlieCard fare collection system, many RTAs have implemented, or are in the process of implementing, the same system. These RTAs include:

- BAT
- CCRTA (in process)
- GATRA (planned)
- LRTA
- MART (in process)
- MWRTA
- PVRTA (planned)
- SRTA (in process)

The MBTA assists the RTAs with implementation. It also processes CharlieCard system fare data for the RTAs. It should be noted that PVRTA has opted to implement a smart card system using a different vendor—that system is expected to come on line in July 2012.

Other

BAT has an agreement with Bridgewater State University (BSU). The University owns four vehicles and operates three local routes. BAT trains BSU drivers (who are typically students) and maintains the vehicles under contract to BSU.

POTENTIAL OPPORTUNITIES

Summary of Issues/Potential Opportunities

Opportunities for cross-border collaboration encompass many aspects of RTA responsibilities. Based on the results of the stakeholder interviews, technical work conducted as part of the study, and Advisory



Committee input, there are a number of issues that could be better addressed through cross-border collaboration. These include:

- Planning for regional services
- Management and operation of regional facilities
- Assistance with regulatory requirements (especially Title VI)
- Assistance with grant applications
- Construction management
- Vehicle heavy maintenance
- Bus painting
- Driver training
- Travel training
- Procurement (through blanket contracts or joint purchases)
- Technology/ITS procurement

Actions to Consider

There are a number of different approaches through which these issues could be addressed. One would be to develop statewide (MassDOT) initiatives to provide assistance throughout the state (as described in *Initiative 10: Improve MassDOT/RTA Collaboration*). Other approaches would include:

- Use of the MassDOT/RTA Council to address and develop solutions to cross-border/inter-RTA issues.
- A greater focus by MARTA on providing technical assistance to the RTAs in terms of identifying, addressing, and developing solutions to cross-border/inter-RTA issues.
- Development of “Centers of Excellence” in which one or more RTAs or the MBTA would become experts in specific subject areas and then provide assistance to other RTAs. Examples include:
 - Construction management
 - Vehicle heavy maintenance
 - Bus painting
 - Sign production
 - Driver training
 - Travel training
 - Procurement
 - Fare collection technology
 - Technology/ITS procurement
 - Data collection and management
 - Public information
 - Planning expertise

In many cases, it is likely that the MBTA and the larger RTAs would become the Centers for Excellence as they currently have the largest technical capabilities. However, in some cases, such as NRTA’s implementation of smartphone based real-time passenger information, smaller RTAs could also become Centers of Excellence.

It should also be noted that the same approach would not need to be used for each issue (and it would likely not be appropriate to use the same approach). Examples of different ways that collaboration could work include:



- The MBTA and the RTAs could work through the MassDOT/RTA Council or MARTA to address regional service needs, service delivery approaches, and cost sharing agreements. As examples:
 - The MBTA currently provides bus service in RTA areas (for example, Bedford, Burlington, and Weston), and is proposing reductions in these services as a result of its financial problems. With appropriate cost-sharing arrangements, it may be possible for RTAs to operate some of these services at a lower cost, in which case more service could be preserved.
 - The MBTA is also proposing reductions in commuter rail service that operates between RTA areas and Boston. Again, with appropriate financial arrangements, it may be possible to offset some of those reductions with new RTA provided bus service to and from Boston.
- MassDOT, the MBTA, and the RTAs could work through the MassDOT/RTA Council to develop a consistent and mutually agreeable framework through which RTAs would manage outlying commuter rail stations.
- MassDOT could develop statewide initiatives in some areas such as Title VI compliance and blanket contracts for procurement.
- The MBTA and larger RTAs could provide services such as heavy maintenance, driver training, and bus painting for smaller RTAs.
- MARTA could work with RTAs on the joint purchase of fixed assets such as vehicles and shelters, services such as liability and health insurance, and fuel.
- The MBTA and individual RTAs could act as Centers of Excellence to provide assistance to other RTAs in specialized areas such as ITS implementation. For example, CCRTA and NRTA have the most advanced real-time passenger information systems, and PVTA is advancing a number of ITS initiatives, and these RTAs could share that expertise with others.
- The RTAs could work together through the MassDOT/RTA Council or MARTA to improve public information.

As described above, there are a number of ways that the RTA could collaborate. For discussion at the March Advisory Committee meeting:

1. Which types of collaboration would provide the greatest potential for improvement?
 - Planning for regional services
 - Management and operation of regional facilities
 - Assistance with regulatory requirements (especially Title VI)
 - Assistance with grant applications
 - Construction management
 - Vehicle heavy maintenance
 - Bus painting
 - Driver training
 - Travel training
 - Procurement (through blanket contracts or joint purchases)
 - Technology/ITS procurement
 - Others? What?
2. Which ones would provide less value but should still be pursued?
3. For those that should be pursued, which types of approaches should be considered?



- MassDOT initiative (as in *Initiative 10 Improve MassDOT/RTA Collaboration*)
- Through MassDOT/RTA Council
- Through MARTA
- Through the development of Centers of Excellence
- Direct work between two or more RTAs
- Other?



FOR MORE INFORMATION:

A Handbook for Coordinating Transportation Services – Volume I, Ohio Department of Transportation, Office of Public Transportation, October 1997, 2003 re-issue:

<http://www.dot.state.oh.us/Divisions/Planning/Transit/Pages/Publications.aspx>

A Guide for Implementing Coordinating Transportation Systems – Volume II, Ohio Department of Transportation, Office of Public Transportation, October 1997, 2003 re-issue:

<http://www.dot.state.oh.us/Divisions/Planning/Transit/Pages/Publications.aspx>

Regional Organizational Models for Public Transportation, TCRP Project J-11, Booz/Allen/Hamilton in association with Paul Bay, January 2011:

http://www.apta.com/resources/reportsandpublications/Documents/Organizational_Models_TC_RP_J11_Task10.pdf

Toolkit for Rural Community Coordinate Transportation Services, TCRP Report 101, Transportation Research Board, Jon E. Burkhardt, Charles A. Nelson, Gail Murray, David Koffman, 2004:

http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_101.pdf

Washington State Transit Insurance Pool (website):

<http://www.wstip.org/default.aspx>

Southern California Regional Transit Training Consortium (website):

<http://www.scrttc.com>